

**SUBJECT: PREPARATION OF FITNESS REPORTS FOR ORGANIZATION EMPLOYEES**

GENERAL

It is Organization policy that an evaluation be prepared for each staff employee and staff agent at least once each year and that employees be informed concerning the effectiveness of their work performance. Regulation [ ] outlines the requirements and procedures for the preparation of the initial, annual, reassignment, and special reports. The Fitness Report, Form No. 45, is used to record evaluations. However, an evaluation in memorandum form may be substituted for Form No. 45 for employees in grades GS-14 and above. 25X1

INITIAL REPORT

A fitness report will be prepared for each employee as of nine months after his entrance on duty with the Organization. This report is of particular importance in providing a record of the supervisor's evaluation of the employee before the completion of his twelve-month trial period. An initial report may be deferred for a period not to exceed 30 days beyond the due date to provide the supervisor with additional time to evaluate an employee who has been under his jurisdiction for less than 90 days.

ANNUAL REPORT

A fitness report will be prepared annually for each employee, except when a fitness report has been made for some other purpose within 90 days of the annual report due date. An annual report may be deferred until the employee has been under the jurisdiction of the supervisor for 90 days.

SCHEDULE FOR THE SUBMISSION OF ANNUAL REPORTS

<u>GRADES</u>	<u>TO BE COMPLETED BY</u>
GS- 1 through GS- 6	30 JUNE
GS- 7 through GS-10	30 SEPTEMBER
GS-11 through GS-12	31 DECEMBER
GS-13 and above	31 MARCH

INSTRUCTIONS

FOR THE ADMINISTRATIVE OFFICER: The fitness report will be prepared in accordance with [ ] and be submitted in triplicate to the head of the career service concerned. The head of the career service will retain one copy and will forward the original and one other copy to the Office of Personnel.

SECTION A GENERAL -- self-explanatory

SECTION B EVALUATION OF PERFORMANCE OF SPECIFIC DUTIES

In this section the supervisor will list the most important duties the employee has performed during the rating period and will rate each duty separately. Duties should be listed in order of importance. Compare when possible the individual being rated with others performing the same duty at a similar level of responsibility. Two individuals with the same job title may be performing different functions and should be rated on different duties. Very careful consideration should be

SECRET

**SECRET**Form No. 45  
17 January 1958**SECTION B (Continued)**

given to the listing of duties and the rating given each duty because this section is an important basis for the evaluation of the employee for future assignments. If the job requires maintaining files, say what kind; if it requires preparing contributions to NIS chapters, say what chapters; if it requires interviewing job applicants, say what level or what kind of jobs; if it requires conducting investigations, tell what kind and for what purpose; if it requires liaison activities, tell what kind and with whom; if it requires analyzing reports or preparing reports, tell what kind, what subjects, and for what purpose.

Examples: "Operates 1250 multilith press" -- not "operates press."  
"Types research reports having many tables" -- not "types."  
"Serves as senior case officer for 7 important current operations using knowledge of French and Polish languages" -- not "senior case officer."  
"Supervises second-line supervisors who direct economic research" -- not "directs research."  
"Responsible for processing fiscal, financial, and budget reports for an operating branch of 50 people" -- not "financial support."

**SECTION C EVALUATING OVERALL PERFORMANCE IN CURRENT POSITION**

In making this rating the supervisor should take into account the employee's conduct on the job as well as his performance on all specific job duties. Each supervisor will weigh these factors in his own mind so as to arrive at a rating which will reflect an employee's value on the job. It is quite possible for an individual to be rated high on a number of specific duties and yet rated average or below on overall performance because his conduct on the job interferes with getting the work done. Conversely, a person with relatively low ratings on certain specific duties may be rated high on overall job performance because his conduct on the job facilitates the work of the office or because of other personal qualities that he brings to the job.

**SECTION D DESCRIPTION OF THE EMPLOYEE**

In this section the supervisor considers the employee from a succession of different angles and makes a number of close judgments about him. These judgments should be based on the characteristics demonstrated by the individual in his current position. The statements in this series apply in some degree to most people, but should be checked only when such ratings assist in the description of the individual. This section is a good test of the supervisor's ability to observe his subordinates.

**SECTION E NARRATIVE DESCRIPTION OF MANNER OF JOB PERFORMANCE**

In this section the supervisor describes the employee's demonstrated abilities or deficiencies in the performance of his present job. Any relatively high or very low ratings in SECTIONS B, C, and D should be justified by supporting statements. In addition, the supervisor may comment here on any extenuating circumstances which affect the productivity and effectiveness of the employee.

**SECTION F CERTIFICATION -- Self-explanatory****SECRET**